Directions: Please complete shaded areas below.

Department Name: Finance, Tax Collector
Project Name: Tax Collection System Replacement

Additional Information and Clarification:

The following addresses questions posed about the IT Business Case for Replacement of the Tax Collection System. Peer Review questions are in bold type; our responses are in regular type.

There is NO justification or details on where the Project Amount came from.

When we initiated this project, we contacted the Gartner Group for guidance and cost estimates. Furthermore, we conducted a survey of the largest counties (six counties with the highest populations) in Florida, and asked their Tax Collectors a series of questions about their systems. Subsequently, we discussed cost estimates with several vendors. The Project Amount was an estimate based on all the information gathered from these sources.

The claim of "less expensive to maintain, addresses unmet needs and is customer-friendly" is not substantiated in any way; although this seems to be a significant part of the justification for the $2 million project.

It would be difficult – without showing the screens and reports – to describe how the current system sometimes cannot meet our needs, but here is an example: Last year the Tax Collector combined our Occupational License and Personal Property units to produce more efficient use of field personnel. When we tried to combine the information systems as well, the task proved impossible. Insurmountable incompatibilities included the following:

- The Occupational License and Personal Property systems were unique and separate databases that used different unique record identifiers. This prevented system cross-referencing and integration.
- The two databases had different standards with regard to street address data entry; for example, "SW 40 St." and "Bird Road" are the same street, but with hundreds of similar matching equivalents, it was impossible to program the systems to cross-reference. This prevented the production of consolidated field personnel routing reports.
- The Personal Property database accepted partial payments, while the Occupational License database did not. The cost of re-programming the O.L. system was prohibitive.
- Neither of the two systems provided useful personnel productivity reports for management. Consequently, our internal IT staff developed PC-based stand-alone systems to accommodate management's needs. But each time we developed a PC-based system to make up for the shortcomings of the main systems, it created other problems, including double data entry; greater probability of data errors; multiple reports that did not balance; and double system maintenance.

We could cite many more examples of how the current system does not provide the integration we need, and how re-programming the system is neither cost-effective nor feasible.

When does manufacturer support end? Is that absolute or negotiable?

The degree of manufacturer or vendor support is negotiable and covers a full range of options. These include complete support by the County to partial support or the purchase of a system supported by the vendor.

The current system, based on outdated technology, relies on programmers writing code. Since its inception, the system has been maintained almost exclusively by the same two programmers. There is concern that if those two programmers leave their positions before we have migrated to a new system, the operations of the Tax Collector would be in jeopardy. Considering the age of the system, it will become increasingly difficult to find competent programmers capable of maintaining this old system.

The proposed system is claimed to be "more efficient, fully integrated, etc" with the current Property Appraiser's system, yet no details are given.

We have invited several vendors to make presentations of their systems to our managers. The systems we have seen are based on current IT platforms (e.g., Oracle and/or Microsoft's SQL Server), platforms that allow "scalability" which provides

a number of advantages:

- The IT staff is currently divided into two camps: mainframe programmers and PC/network developers. With up-to-date scalable platforms, all programmers/developers will be able to write applications against **the same system**, thereby eliminating multiple system programming, maintenance, and data entry.
- The current outdated system presents compatibility issues when interfacing with other systems. For example, the Tax Collector's system should be more integrated with the Property Appraiser's system since the Property Appraiser is where the real estate property folio data originates. But the Property Appraiser recently upgraded their system totally independently from the Tax Collector. If the Tax Collector had an up-to-date system, we could leverage system compatibilities, thereby eliminating a great deal of data entry and maintenance.
- Another example involves our use of the County's Geographic Information System (GIS). The GIS would be perfect for producing the previously mentioned field personnel routing reports. Our current, antiquated system could not produce data compatible with - and appropriately cross-referenced to - the GIS data, so we were not able to produce the needed reports. We will make sure that the new system we choose will have the compatibility and integration necessary to take advantage of complementary systems like the GIS.

Does this mean that the new system will be a 'sole source' type of procurement?

No. As previously mentioned, we have identified several vendors who have products worthy of consideration.

Finally the claim that "maintenance cost for the new system" will be considerable less is not substantiated in any way. In summary, $2 million is a lot to commit based on a bunch of 'opinions' and sales pitch type of platitudes

We have repeatedly requested assistance in acquiring a new Tax Collection System over a period of many years and it is important that the critical nature of purchasing a new system not be taken lightly. As previously stated the current system processes over **three billion dollars** of County revenue a year, equal to roughly sixty percent of the entire Miami-Dade County budget. This system was developed almost twenty years ago in IDMS/COBOL and is not a relational database. It has been patched and re-patched so many times that it has become difficult to modify and extremely costly to maintain. We pay roughly **$300,000 annually** for its maintenance. By any IT professional standards this system is way overdue for replacement, especially considering the amount of revenue processed, the annual maintenance costs and the repercussions, both political and financial, the failure of this system will have upon government operations.